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ABSTRACT

The purpose of these guidelines is to provide consistent, systematic standards for evaluating instructional materials proposed for use in California's public elementary schools to ensure compliance with their Education Code. Developers believe that the guidelines should be used when evaluating both student and teacher material and for separately evaluating each component of a series. The major portion of the guidelines provides specific criteria for evaluating how male and female roles and ethnic and cultural groups are treated in the curricula. Some criteria for evaluating how labor and religion are treated are also provided. Examples of criteria include that descriptions, depictions, and labels which tend to demean, stereotype, or be patronizing toward females, minority groups, and/or occupations must not appear; references and illustrations must refer to males and females approximately evenly in both number and importance and must refer to a fair proportion of diverse ethnic groups; sexually neutral language such as people, persons, they, and pioneers should generally be used; no religious belief or practice shall be held up to ridicule; and students must not be indoctrinated in any particular religious belief. The paper concludes with extracts from the Education Code regarding a variety of topics including portrayal of cultural and racial diversity and prohibited instructional materials.
(Author/DB)

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GUIDELINES FOR EVALUATION OF INSTRUCTIONAL MATERIALS WITH RESPECT TO SOCIAL CONTENT

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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Prepared by the
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CONTENTS

Guidelines for Evaluation of Instructional Materials with Respect to Social Content.

Guidelines

Purpose 1

General Limitations.....1

Materials in a Series.....2

Specific Criteria for Evaluation of Instructional Materials by Members of the Legal Compliance Committee.

A. Male and Female Roles.....3

B. Ethnic and Cultural Groups.....6

C. Entrepreneur and Labor.....9

D. Religion.....10

GUIDELINES FOR EVALUATION OF INSTRUCTIONAL MATERIALS WITH RESPECT TO THE SOCIAL CONTENT

Purpose

The purpose of these guidelines is to provide consistent, systematic standards for evaluating instructional materials proposed for use in California's public elementary schools to ensure compliance with the Education Code.

Children pattern their interests, prejudices, and ideas after what they see and hear. Children dream of and aspire to those goals they are encouraged to attain. Their world can be expansive and filled with exciting and infinite possibilities, or frustrating in its limitations, depending on their exposure. Much of a child's early development takes place in school, and the potentially positive or negative effect of the school experience is well documented. The Legislature recognized the vital role instructional materials play in the formation of a child's attitudes and beliefs when it adopted Education Code Sections 60040 and 60044.

These guidelines are not intended to supplant the evaluator's judgment, because it would be impossible to do so. They do comprise the minimum standards for acceptability, including compliance with Education Code Sections 60040 and 60044.

In order to portray accurately the cultural and racial diversity and the male and female roles in our society, instructional materials must encourage students to understand not only the historical roles and contributions of women and minorities, but also the forces which shaped those roles and contributions, and how and why the contemporary roles and contributions of women and minorities are different.

General Limitations

1. The guidelines should be used when evaluating both the student material and the teacher material. In no event should instructions in a teacher manual designed to overcome noncompliant pictures or text in a pupil edition be given any consideration in evaluation of the pupil edition.

2. In certain limited situations it would be inappropriate to require that a pictorial or textual item conform exactly to these guidelines. Such an instance would arise, for example, in reprinting an item of classical or contemporary literature, music, or art, including folk tales, which is considered to make an important contribution to a given instructional material. In such a situation, however, discussion material should be included in the pupil edition indicating that, for example, although a particular attitude toward women or a minority group was prevalent during a certain period in history, or is prevalent in the particular culture or country depicted, that attitude has changed or does not occur in the contemporary United States, as appropriate.

3. When examining an instructional material for adverse reflection on one's race, creed, sex, etc. prohibited by Education Code Section 60044, the evaluator should make a qualitative judgment with respect to stories or articles having a historical or particular cultural perspective. Any

description, depiction, label, or retort found to be, by itself, an adverse reflection should not be judged out of context. Rather, the story or article should be examined for appropriate explanations, discussion, or other devices included therein, or immediately attached thereto, which may overcome the impact of such offending words or pictures. The instructional material should be rejected only if, on a total basis, the story or article would, in the mind of an average pupil for whom the material is intended, reflect adversely upon a person because of his or her race, color, creed, national origin, ancestry, sex, or occupation.

4. These guidelines may be inapplicable to certain instructional materials. For example, materials need not include references to people. Therefore, math problems described solely in abstract terms or stories about animals without human attributes are outside the scope of these guidelines. Additionally, materials which contain references to children need not include references to adults.

5. In determining how strictly to apply the guidelines, consideration must also be given to the number of characters presented, and the relationship among them. For example, if there are only three or four main characters, or if all of the main characters are members of the same family, it would obviously be unrealistic to expect a wide diversity of ethnic groups and kinds of roles portrayed. Likewise, if the setting is restricted to a certain locale, such as a large city ghetto or a sparsely settled desert region, the possibilities for showing a wide range of socio-economic groups in a wide range of activities are necessarily limited.

Materials in a Series

When evaluating instructional materials which are designed to be used as a graded, nongraded, or multigraded series, each component thereof shall be judged individually for compliance and without regard to the content of any other component. However, a group or sequence of materials which is designed for use exclusively within a particular single grade shall be judged on a total basis for compliance with the sex and ethnic portrayal standards in Education Code Section 60040, but judged on an individual basis for compliance with the prohibitions in Education Code Section 60044 concerning adverse reflections on one's race, creed, sex, etc. For example, if a package of three different books is designed to be used as fourth-grade readers, and a pupil is expected to complete all the books in that school year, any portrayal deficiencies found in one book may be balanced against any exemplary portrayal in another book. However, each of the three books must be judged separately for compliance with the adverse reflection prohibitions.

SPECIFIC CRITERIA FOR EVALUATION OF INSTRUCTIONAL MATERIALS
BY MEMBERS OF THE LEGAL COMPLIANCE COMMITTEE

A. Male and Female Roles - Education Code 60040(a) and 60044(a)

In order to encourage the individual development and self-esteem of each child, regardless of gender, instructional materials, when they portray people (or animals having identifiable human attributes), shall portray women and men, girls and boys, in a wide variety of occupational, emotional, and behavioral situations, presenting both sexes in the full range of their human potential.

The following criteria #1 and #2 are essential, and each shall be met. The remainder of the criteria should be met, but 100 percent compliance on each one is not essential to a "yes" vote. Unless the deficiency is flagrant, failure in one of the criteria #3 through #9 should not disqualify the item, provided it meets the other criteria to a reasonable degree. Criteria #3 through #9 may be judged as a group, wherein an especially good rating on one criterion may compensate for a poorer showing on another one.

Regardless of subject area, all the following criteria apply to all instructional materials that reflect contemporary United States or California society or any unidentifiable society. In addition, Criterion #1 applies to all materials that reflect any society outside the United States (but see General Limitations #3).

Consideration is given to reprints of certain types of literature, music, and art which do not conform to any one or more of these criteria (see General Limitations #2). For example, when references to women are omitted, their absence must be discussed and questioned in the student edition, with an eye toward making the student aware of the historical and cultural situation in which this inequality occurred, the process of philosophical change and its effects on social patterns, and the underlying goal of equality basic to our democratic system.

1. Descriptions, depictions, labels, or retorts which tend to demean, stereotype, or be patronizing toward females must not appear.

   (Do references to women indicate that their talents, intelligence, or activities are inferior to those of men? Or that they are incapable of handling a situation without a man's assistance? For example, there should be no labels such as "old maids," "fishwives," "henpeckers," or "woman driver," or retorts such as "she's only a girl" or "what do you expect from a girl?" Such references constitute adverse reflections. See discussion in "General Limitations" on page 1.)

2. Instructional materials containing references to, or illustrations of, people must refer to or illustrate males and females approximately evenly, in both number and importance, except as limited by accuracy or special purpose.

   (This criterion is largely self-explanatory. It applies to any materials in which the gender of persons is referred to or illustrated, whether incidental to the purpose of the material or not.)

Even though numerically the portrayals of males and females may be approximately even, the aspect of importance or impact of those portrayals is a qualitative judgment. For example, assume that a single illustration of one or more females is quantitatively overbalanced by a ten-page story of one or more male characters. If, however, the illustration is judged to have an educational effectiveness or impact equal to or greater than that of the story, the two items may be considered to be in balance.)

3. Mentally and physically active, creative, problem-solving roles, and success and failure in those roles, should be divided approximately evenly between male and female characters.

   (It is important to look for instances in which females, both girls and women, are involved in mentally and physically active, creative, problem-solving roles--such as conducting a science experiment, participating in sports, repairing a broken object, building a bookcase--that are all too often depicted as male-oriented, and determine whether such instances occur in a fair proportion to those involving males.

   The consequences of activity undertaken by males and females must be observed. Positive or negative results can come from the undertaking of any task. A pattern of positive or negative results, perhaps most simply defined as success or failure, should not emerge as correlated with sex. It is not suggested that all characters succeed at all times. However, the ratio of success to failure must be approximately the same for female characters as for male characters.)

4. Emotions--for example, fear, anger, aggression, excitement, or tenderness--should occur randomly among characters regardless of gender.

   (All people are capable of, and susceptible to, all emotions, and the idea that only females cry and only males fight is an inaccurate projection of reality. This is not to say that instructional materials must consistently depict males and females in reversed emotional roles. Evaluators should, however, be aware of the tendency to stereotype emotions. If any pattern appears, such as only females expressing fear or tenderness, or only males expressing anger, the material does NOT meet this criterion.)

5. Traditional activites engaged in by characters of one sex should be balanced by the presentation of nontraditional activities for characters of that sex.

   ("Traditional" in this criterion refers to activities which are generally considered appropriate for persons of one sex. For instance, women cooking, sewing, or cleaning; men working in employment outside the home; boys playing baseball; or girls playing with dolls. The instructional materials certainly need not exclude such activities. They should balance such portrayals with their opposite--nontraditional activities for such persons. Examples might be a boy reading or at quiet play, a man seeking help solving a problem. Adults of both sexes should be portrayed in domestic

domestic chores, recreational activities, and creative endeavors whenever these activities are portrayed in the materials. Balance is achieved when instances of traditional activity can be shown in fair proportion with instances of nontraditional activity. The evaluator should make a qualitative judgment about the competing portrayals. For example, a single illustration or a short poem which is nontraditional is quantitatively overbalanced by a ten-page story involving a traditional activity. However, the story would still be acceptable if the illustration or poem has an educational effectiveness or impact equal to or greater than that of the story.)

6. If professional or executive roles, or vocations, trades, or other gainful occupations are portrayed, men and women should be represented therein approximately equally.

   (This criterion is relatively self-explanatory. Its purpose is to expand the portrayal of occupational roles of men and women and enable children to identify with all fields of enterprise, regardless of sex.

   Evaluators should ensure that instructional materials indicate an equally wide variety of vocational choices for men and women, measured by the number of vocations in which women are depicted compared to the number in which men are depicted. Disproportionate numbers of women portrayed in a particular vocation should indicate that the material requires careful scrutiny for compliance.

   Many professions [for example, medicine, law, engineering, and banking] are typically portrayed as male-dominated. Evaluators should ensure that women are depicted in such professional roles approximately as often as men. Whether such equality is achieved can most easily be ascertained by a simple head count comparison of male and female main and background characters portrayed in professional roles. Women should also be presented in executive positions--as business executives, officials, and administrators, for example--as often as men are. Similarly, women should be presented in skilled occupations such as building and other technical trades.)

7. Where life-style choices are discussed, boys and girls should be offered an equally wide range of such aspirations and choices.

   (Various occupations and various life styles--marriage, remaining single, raising children or not doing so--should also be cast in an affirmative light. A child should not learn that women can, and do, work outside the home, but are unhappy, tired, or too busy enjoy life if they do so. Fanatasies and dreams of children for their own futures should not be sex-stereotyped.)

8. Whenever a material presents developments in history or current events, or achievements in art, science, or any other field, the contributions of women should be included and discussed when historically accurate.

(This criterion is designed to prevent a continuation of the common practice in instructional materials of failure to give sufficient attention to the achievements of women in all fields of endeavor which are discussed. In the development of any field, the contributions of women can generally be accurately included. Women have, because of the bias in our culture, generally been less esteemed and less recognized, no matter what their field, than men who made comparable contributions.

The criterion does not set out specific requirements. However, if biographies are included in the material, biographies of women should be presented. Evaluators will find that materials which simply ignore half the population of any nation are not acceptable.)

9. Sexually neutral language--for example, "people," "persons," "men and women," "pioneers," "they"--should generally be used.

(The standard here is basically objective and easy to measure: Does the material indulge in male references so as to exclude females as participants in society? It is left to the evaluator's discretion to determine when there are extenuating circumstances, such as adherence to grammatical rules or the requirement to convey the author's intended meaning.)

B. Ethnic and Cultural Groups - Education Code Sections 60040(b) and 60044(b)

In order to project the cultural diversity of our society, instill in each child a sense of pride in his or her heritage, eradicate the seeds of prejudice, and encourage the individual development of each child, instructional materials, when portraying people (or animals having identifiable human attributes), shall include a fair representation of majority and minority group characters portrayed in a wide variety of occupational and behavioral roles, and present the contributions of ethnic and cultural groups, thereby reinforcing the self-esteem and potential of all people and helping the members of minority groups to find their rightful place in society.

For purposes of these criteria, "group" means one of those cultural and racial groups referred to in Section 60040 of the Education Code, namely, "American Indians, American Negroes, Mexican Americans, Asian Americans, European Americans, and members of other ethnic and cultural groups".

The following Criteria #1, #2, and #3 are essential, and each shall be met. The remainder of the criteria should be met, but 100 percent compliance on each one is not essential to a "yes" vote. Unless the deficiency is flagrant, failure in one of Criteria #4 through #9 should not disqualify the item, provided it meets the other criteria to a reasonable degree. Criteria #4 through #9 may be judged as a group, wherein an especially good rating on one criterion may compensate for a poorer showing on another one.

Regardless of subject area, all the following criteria apply to all instructional materials that reflect contemporary United States or California society or any unidentifiable society. In addition, Criteria #1 and #2

apply to all materials that reflect any contemporary society outside the United States (but see General Limitations #3).

Consideration is given to reprints of certain types of literature, music, and art which do not conform to any one or more of these criteria (see General Limitations #2). For example, when references to minority persons are omitted, their absence must be discussed and questioned in the student edition, with an eye toward making the student aware of the historical and cultural situation in which this inequality occured, the process of philosophical change and its effects on social patterns, and the underlying goal of equality basic to our democratic system.

1. Descriptions, depictions, or labels which tend to demean, stereotype, or be patronizing toward minority groups must not appear.

   (Evaluators should note all references indicating that the talents, activities, or demeanor of racial or ethnic groups are inferior, such as, for example, "savage Indian" or "lazy Mexicans". Such references constitute adverse reflections. See discussion in "General Limitations" on page 1.)

2. When diverse ethnic or cultural groups are portrayed, such portrayal must not depict differences in customs or life-style as undesirable and must not reflect an adverse value judgment of such differences.

   (This criterion is fairly self-explanatory. Diversity must be portrayed as an enriching and positive element of our society. In no manner should any other culture be presented as less worthy or less important than the culture of the majority group.)

3. Instructional materials containing references to, or illustrations of, people must refer to or illustrate a fair proportion of diverse ethnic groups, except as limited by accuracy or special purpose.

   (This criterion is largely self-explanatory. Whereas a book or other material dealing with urban sprawl must include references to the diverse ethnic groups existing in our cities, this criterion does not apply to materials dealing only with a narrow or special aspect of United States or California society such as, for example, a book dealing solely with life in the barrio or solely with black authors.)

4. Mentally active, creative, and problem-solving roles, and success and failure in those roles, should be divided in fair proportion between majority and minority group characters.

   (Evaluators must examine instances in which minority characters are portrayed in mentally active, creative, and problem-solving roles, in contrast to the more physical manual labor in which they are often depicted. Although such portrayals should appear in a ratio supportive of the proposition that talents are equal in all peoples, such ratios must fairly reflect respective representation of total population.

It is likely that in many situations the characters portrayed in active, problem-solving roles will be main characters, and a count of majority and minority main characters involved in such activites should therefore yield a good starting point for the evaluator to judge whether this criterion is met.

It is necessary to look to the consequences of activities undertaken by majority and minority group characters presented in the material. Positive or negative results, success or failure, can flow from the undertaking of any tasks, and it is not suggested that all characters succeed at all times. A pattern of success or failure, however, should not emerge as correlated with the race, ethnicity, or cultural background of the character.)

5. The portrayal of minority characters in roles to which they have been traditionally restricted by society should be balanced by the presentation of nontraditional activities for characters of that race.

("Traditional" in this criterion refers to activities which are associated in a stereotypical way with persons of a certain race--for instance, Mexican Americans engaging in farm labor, Asian Americans operating laundries, etc. The instructional materials need not altogether exclude such activites. However, such portrayals should be balanced with their opposite--nontraditional activities for such persons. Balance is achieved when, at a minimum, instances of traditional activity can be shown in fair proportion with instances of nontraditional activity. The evaluator should make a qualitative judgment about the competing portrayals. For example, a single illustration or a short poem which is nontraditional is quantitatively overbalanced by a ten-page story involving a traditional activity. However, the story would be acceptable if the illustration or poem has an educational effectiveness or impact equal to or greater than that of the story.)

6. Minority persons should be depicted in the same range of socioeconomic settings as are persons of the majority group.

(Instructional materials should provide a range of socioeconomic settings with which children can identify, but this criterion does not speak to that need for variety. This criterion directs the evaluator to note and ensure that, if a range of socioeconomic settings is portrayed, minority characters participate in the same range of settings as do majority group characters. Socioeconomic characteristics should not be portrayed as correlated to race or ethnicity.)

7. Depiction of diverse ethnic and cultural groups should not be limited to the root culture, but rather expanded to include such groups within the mainstream of United States life.

(This criterion should be unnecessary, since the statute demands, by implication, the portrayal of minority groups in a United States setting. However, it has been noted that instructional materials have sometimes tended tc portray, for instance, Mexicans

in Mexico and Japanese in Japan as a substitute for presenting the Mexican American and Japanese American experience. Root culture portrayals may be discussed in conjunction with the particular minority group's United States or California experience and, therefore, should not be eliminated. But alone, they do not satisfy this criterion. However, this criterion is not applicable to materials dealing solely with other countries or cultures.)

8. If professional or executive roles, or vocations, trades, or other gainful occupations are portrayed, majority and minority groups should be presented therein in fair proportion.

   (This criterion is self-explanatory. Its purpose is to expand the portrayal of occupational roles of minorities and enable children to identify with all fields of enterprise, regardless of race or ethnicity.

   "Fair proportion" in this criterion does not mean that an equal number of adult minority characters and majority characters shall be portrayed as professionals or executives, etc. Although no specific number or percentage for each statutorily noted minority group is specified, "tokenism" for any minority group is as unacceptable in instructional materials as it is in the real world of employment.)

9. Whenever developments in history or current events, or achievements in art, science, or any other field are presented, the contributions of minority peoples, and particularly the identification of prominent minority persons, should be included and discussed when historically accurate.

   (It is important to note that, in the development of any field, contributions of minority peoples can generally be accurately included. Minority persons have, because of the bias in our culture, generally been less esteemed and less recognized, no matter what their field, than majority persons who have made comparable contributions. It is the publisher's responsibility to include minority persons in the instructional materials, and this inclusion should extend to all the statutorily noted groups. If biographies are included in the material, biographies of minority persons should be presented.)

C. Entrepreneur and Labor - Education Code Sections 60040(c) and 60044(a)

Criterion #1 is an essential item--in order for the material to be approved, this criterion SHALL be met. Criteria # 2 and #3 should be met, but one 100 percent compliance on each one is not essential to a "yes" vote.

1. References or labels which tend to demean, stereotype, or be patronizing toward an occupation, vocation, or livelihood must not appear.

2. Where appropriate, reference should be made to the role and contribution of the entrepreneur in the total development of California and the United States, and any such reference should be accurate.

3. Where appropriate, reference should be made to the role and contribution of labor in the total development of California and the United States, and any such reference should be accurate.

D. Religion - Education Code Sections 60040(b) and 60044

These three criteria are essential items--in order for the material to be approved, they SHALL all be met.

1. No religious belief or practice shall be held up to ridicule, nor any religious group portrayed as inferior.

2. Any explanation or description of a religious belief or practice shall be presented in a manner which neither encourages nor discourages belief in the matter, nor indoctrinates the student in any particular religious belief.

   (This criterion must not be construed to mean that the mere depiction of religion constitutes indoctrination. For example, religious songs and art may be included in instructional materials.)

3. Portrayals of contemporary United States society should, where religion is discussed or depicted, reflect its religious diversity. Except where a material deals with a particular racial, ethnic, or cultural group or a particular historical era in the United States or California, materials in, but not limited to, art, music, and social sciences must, to a reasonable extent, reflect the religious diversity of contemporary United States society. (Education Code Section 60040(b) in conjunction with cultural diversity.)

EXTRACTS FROM EDUCATION CODE

Portrayal of Cultural and Racial Diversity

60040. When adopting instructional materials for use in the schools, governing boards shall include only instructional materials which, in their determination, accurately portray the cultural and racial diversity of our society, including:

(a) The contributions of both men and women in all types of roles, including professional, vocational, and executive roles.

(b) The role and contributions of American Indians, American Negroes, Mexican Americans, Asian Americans, European Americans, and members of other ethnic and cultural groups to the total development of California and the United States.

(c) The role and contributions of the entrepreneur and labor in the total development of California and the United States.

Ecological System; Use of Tobaccco, Alcohol, Drugs, and OtherDangerous Substances

60041. When adopting instructional materials for use in schools, governing boards shall include only instructional materials which accurately portray, whenever appropriate:

(a) Man's place in ecological systems and the necessity for the protection of our environment.

(b) The effects on the human system of the use of tobacco, alcohol, narcotics and restricted dangerous drugs as defined in Section 11032 of the Health and Safety Code, and other dangerous substances.

Thrift, Fire Prevention and Humane Treatment of Animals and People

60042. When adopting instructional materials for use in the schools, governing boards shall require such materials as they deem necessary and proper to encourage thrift, fire prevention and the humane treatment of animals and people.

Declaration of Independence and Constitution of the United States

60043. When adopting instructional materials for use in the schools, governing boards shall require, when appropriate to the comprehension of pupils, that textbooks for social science, history, or civics classes contain the Declaration of Independence and the Constitution of the United States.

Prohibited Instructional Materials

60044. No instructional materials shall be adopted by any governing board for use in the schools which, in its determination, contains:

(a) Any matter reflecting adversely upon persons because of their race, color, creed, national origin, ancestry, sex, or occupation.

(b) Any sectarian or denominational doctrine or propaganda contrary to law.